



[EXCLUSIVEDATA]

# Top 25 Bottlers Report 2006

Ranked by 2005 net sales

## 1 Coca-Cola Enterprises

2005 SALES (MILLIONS US\$)—\$18,706

2500 Windy Ridge Parkway, Atlanta, GA 30339, Tel: 770/989-3000, Fax: 770/989-3788 • **Employees:** 73,000 (62,000 in the US and 11,000 in Europe) • **Key Executives:** Lowry Kline, chairman; John Brock, president and CEO; John Culhane, EVP and general counsel; Shaun Higgins, EVP and president, European Group; Terry Marks, EVP and president, North American Group; Vicki Palmer, EVP financial services and administration; William Douglas III, SVP and CFO; John Downs, Jr., SVP public affairs and communications; John Parker, Jr., SVP strategic initiatives, North American Group; Greg Lee, SVP human resources; Rick Engum, VP and CFO, North American Group • **2005 Unit Case Sales (millions):** 2,000 • **Facilities:** (US & Canada): 396 in North America (32 in Europe) • **Territories:** 46 states and Canada; Belgium, France, Great Britain, Luxembourg, Monaco, The Netherlands • **Franchise Share:** 76.8% of Coke; 36.3% of Tahitian Treat; 33.9% of Squirt; 27.5% of Dr Pepper; 20.6% of Canada Dry; 13.9% of Schweppes; 3.7% of Big Red • **Behind the Numbers:** In 2005, CCE began distributing many successful new products and brand extensions, including Coca-Cola Zero, Powerade Option and Dasani flavored waters. Additionally, the company expanded its energy drink portfolio with the introductions of Full Throttle and Rockstar, increasing its share of market from less than 1 percent at the beginning of 2005 to more than 18 percent by the end of the year. CCE also added new Fresca flavors and packaging to its lineup, completing an extensive year of product innovation and enabling the company to achieve revenue per case growth in both North America and Europe. CCE also redesigned its North American business model, simplifying the organizational structure and allowing front-line employees and managers more time to interact with customers. When several of the company's customers were faced with the catastrophic loss of their businesses from Hurricanes Katrina, Rita and Wilma in the United States, CCE furnished local customers with water and beverage supplies, restored business operations at the New Orleans Market Service Center, assisted its employees and supported community relief efforts. Additionally, the company created a Corporate Responsibility and Sustainability Advisory Council to help assess and manage the company's impacts on its workplace, marketplace, communities and environment. The company published its first Corporate Responsibility and Sustainability Review in 2006. At the end of the year, CCE's continued commitment to world-class customer service was demonstrated by the company being named "vendor of the year" by both Wal-Mart in the US and ASDA in Europe.

## 2 Pepsi Bottling Group

2005 SALES (MILLIONS US\$)—\$11,885

1 Pepsi Way, Somers, NY 10589, Tel: 914/767-6000, Fax: 914/767-7761 • **Employees:** 66,900 • **Key Executives:** John Cahill, executive chairman; Eric Foss, president and CEO; Yiannis Petrides, president, PBG Europe; Rogelio Rebolledo, chairman PBG Mexico; Robert King, president North American field operations; Gary Wandschneider, EVP Worldwide Operations; Pablos Lagos, president and general manager PBG Mexico; Alfred Drewes, SVP/CFO; John Berisford, SVP human resources; Steven Rapp, SVP/general counsel/secretary; Neal Bronzo, SVP/CIO; Brent Franks, SVP/chief customer officer • **2005 Unit Case Sales (millions):** 1,600 • **Facilities:** 310 US (46 production and 264 distribution centers) 641 worldwide (95 production and 546 distribution centers) • **Territories:** 43 US states (all but AL, IL, IN, MT, MS, ND, OH, SD) and District of Columbia, 9 Canadian provinces, Mexico, Greece, Russia, Spain and Turkey • **Franchise Share:** 57.4% of Pepsi; 44% of Vernor's; 42.9% of Schweppes; 22.6% of Hawaiian Punch; 17.1% of Dr Pepper; 10.4% of Squirt; 6.5% of Sunkist; 1.3% of Big Red • **Behind the Numbers:** The Pepsi Bottling Group (PBG), the world's largest Pepsi bottler, experienced a robust top line growth of 9 percent for 2005. Physical case volume and reported net revenue per case both grew 4 percent for the full year. In the US, volume improved 2 percent on a full-year basis, with a 3-percent increase in the take-home channel and 2-percent growth in cold drink. Innovation in the US and several countries in Europe helped drive volume growth for PBG. In addition, the excitement surrounding new products, such as Aquafina Sparkling and Aquafina Flavorsplash, boosted PBG's strong non-carbonated portfolio. PBG also expanded its territory by purchasing Pepsi-Cola Bottling Company of Charlotte, the franchise bottler in Charlotte, North Carolina.

## 3 PepsiAmericas, Inc.

2005 SALES (MILLIONS US\$)—\$3,726

60 South Sixth Street, Suite 4000, Minneapolis, MN 55402, Tel: 612/661-4000, Fax: 612/661-3825 • **Employees:** 16,000 (12,200 in the US and 3,800 international) • **Key Executives:** Robert Pohlad, chairman/CEO; Alex Ware, SVP/CFO; Ken Keiser, president/COO; Mike Durkin, EVP US operations; Jim Rogers, EVP international operations • **2005 Unit Case Sales (millions):** 400+ • **Facilities:** (US, Caribbean & Central Europe): 159 (28 production and 131 distribution) • **Territories:** 19 US states, Poland, Hungary, the Czech Republic, Republic of Slovakia, Puerto Rico, Jamaica, Barbados, the Bahamas and Trinidad and Tobago • **Franchise Share:** 18.7% of Pepsi; 20% of Hawaiian Punch; 7.5% of Dr Pepper; 4.7% of Welch's; 4.6% of Crush; 3.6% of Sunkist; 3.5% of 7UP (Puerto Rico only); 1.5% of Schweppes; 1.2% of Squirt; 0.8% of Vernor's • **Behind the Numbers:** PepsiAmericas acquired 49 percent of the outstanding common stock of Quadrant-Amroq Bottling Company Limited (QABCL). QABCL is a holding company that, through subsidiaries, produces, sells and distributes Pepsi and other beverages throughout Romania. PepsiAmericas and InBev entered into an exclusive partnership to sell and distribute Beck's in Poland, which began July 4, 2005.

## 4 Dr Pepper/Seven Up Bottling Group\*

2005 SALES (MILLIONS US\$)—\$2,100<sup>3</sup>

5950 Sherry Lane, Suite 500, Dallas, TX 75225, Tel: 214-530-5000, Fax: 214-530-5010 • **Employees:** 9,000 • **Key Executives:** Larry Young, president/CEO; Holly Lovvorn, SVP finance; Tom Taszarek, EVP administration; Terry Graham, president Midwest division; Chuck Shanley, president West division • **2005 Unit Case Sales (millions):** 378 • **Facilities:** 120 US (10 production, 110 distribution) • **Territories:** CA, IA, ID, IL, IN, KS, KY, LA, MI, MN, MO, ND, NE, NM, NV, OH, OK, PA, SD, TX, VA, WA, WV, WI • **Franchise Share:** 63.7% of Big Red; 57.8% of Country Time; 52.9% of 7UP; 52.9% of A&W; 50.7% of RC; 48.6% of Crush; 47.3% of Welch's; 40.6% of Vernor's; 39.5% of Sunkist; 28.7% of Squirt; 23.6% of Hawaiian Punch; 21.9% of Tahitian Treat; 16.6% of Dr Pepper; 11.2% of Canada Dry; 9.3% of Schweppes; 5% of Hires • **Behind the Numbers:** A big bottler for Cadbury Schweppes carbonates with 29 percent of Cadbury's annual volume going through its system, DPSUBG had big news in 2005 as Larry Young joined the company as president and CEO and the company acquired distribution rights in Spokane, WA and Coeur d'Alene, ID as well as acquired licenses for the Fuze and Glaceau brands. • In May 2006, Cadbury Schweppes completed its acquisition of DPSUBG and the company has since been renamed Cadbury Schweppes Bottling Group and has moved its headquarters to Plano, TX. Next year's Top 25 Bottlers Report will reflect these changes.

## 5 Coca-Cola Bottling Company Consolidated

2005 SALES (MILLIONS US\$)—\$1,380

4100 Coca-Cola Plaza, Charlotte, NC 28211, Tel: 704/551-4400, Fax: 704/551-4640 • **Employees:** 5,500 • **Key Executives:** Frank Harrison III, chairman/CEO; Bill Elmore, president/COO; Hank Flint, EVP; Steve Westphal, SVP/CFO; Mel Landis, VP marketing; C. Ray Mayhall, VP sales; Lauren Steele, VP corporate affairs • **2005 Unit Case Sales (millions):** NA • **Facilities (US and Canada):** 53 (5 production, 48 sales centers/other) • **Territories:** AL, FL, GA, MS, NC, PA, SC, TN, VA, WV • **Franchise Share:** 26.8% of Sun-drop; 7.1% of Coke; 3.9% of Dr Pepper • **Behind the Numbers:** During 2005, Coke Consolidated began rolling out its new Cool Lift sales delivery system.

## 6 Honickman Affiliates

2005 SALES (MILLIONS US\$)—\$1,130

8275 Route 130, Pennsauken, NJ 08110, Tel: 856/665-6200, Fax: 856/661-4560 • **Employees:** 5,000 • **Key Executives:** Harold Honickman, chairman; Jeffery Honickman, CEO; Walt Wilkinson, CFO • **2005 Unit Case Sales (millions):** NA • **Facilities (US & Canada):** 11 (6 production, 5 distribution) • **Territories:** DE, MD, NJ, NY, OH, VA • **Franchise Share:** 27.1% of Canada Dry; 20.2% of Welch's; 14.6% of Schweppes; 11% of Sunkist; 11% of Hawaiian Punch; 10.8% of Tahitian Treat; 9.5% of Country Time; 6.5% of A&W; 5.3% of 7UP; 2.1% of Pepsi; 1.8% of Royal Crown • **Behind the Numbers:** Operating since 1957, Honickman is the No. 5 Pepsi bottler as well as the No. 4 overall Cadbury Schweppes bottler.